

File Messages in Folders by Sender Name with a Single Rule

You can easily file messages in folders named by the message sender's name in Auto-Mate with a single rule. This rule can take advantage of the Auto-Mate feature:

- Auto Create Folder

Configure your rule as follows:

Start by creating a basic rule to file incoming messages, but do not specify any From addresses.

Auto-Mate Rule Properties

Rule Name: Archive Messages by Contact

Basics

Conditions

Advanced

Actions

Exceptions

Scheduling

Rule Type: Scan messages when they arrive in my Inbox

Older Than: Any Custom days: 0

Between: 2/ 5/2014 and 2/ 5/2014

Source Folder: \Mailbox - Pergenex Support\Inbox

☐ Recurse sub-folders ☒ Only process newest messages

From:

☐ Include sent on behalf addresses

To Address:

☐ Where I am the only person on the To line

Cc Address:

Rule Category: Filing

☐ List rule in Toolbar/Ribbon Run list ☒ Enable Rule

Favorite Add Rule Cancel Apply

Then configure a rule action to move to a folder. Select the destination folder. Folders will be automatically created beneath this level.

Auto-Mate Rule Properties

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Rule Name: Archive Messages by Contact

← →

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Perform the following actions in sequence from top to bottom

☐ Status
 Set to Unread

☐ Importance
 Set to Normal

☐ Flag Status
 Mark Complete

☐ Categories
 Add Only

☐ Subject
 <SUBJECT>

☐ Forward

☐ Reply
 To Sender
 choose a reply template

☐ Export As
 Text(.TXT)

☐ Attachments
 Detach/Save

☐ Print
 Send To OneNote 2013

☐ Open Message

☐ Copy To

☒ Move To
 \Mailbox - Pergenex Support\Old Mail

☐ Delete
 Delete - move to Deleted Items folder

[Show additional actions...](#)

★ Favorite

Add Rule

Cancel

Apply

Now click the button with the small pencil icon to select Folder Naming Options. Check off "Automatically create a new folder below this level, then select "From Address. You will see a preview of how the folder will appear in your Outlook folder tree.

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Folder Options

Folder Create Options

Control whether folders are automatically created based on message properties

☒ Automatically create a new folder below this level

Naming Format

Select any combination of these fields that are extracted from the message acted upon:

From Address

Separate fields with:

☒ none ☐ space ☐ dash ☐ underscore

Preview:

[-] Old Mail

[] John Smith

OK

Cancel

Click OK and save the rule. The rule will now create folders by Sender name on-the-fly as messages are received.

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<http://www.pergenex.com/kb/index.php?View=entry&EntryID=44>